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# Support for Your Ex Libris Product(s): What Ya Gonna Do? Who Ya Gonna Call?

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## Repository Citation

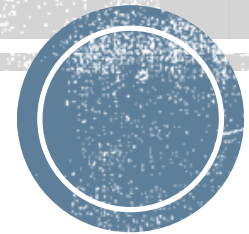
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# Support for your Ex Libris Product(s)

What ya gonna do? Who ya gonna call?



Tari Keller University of Kentucky  
Systems Librarian [keller@uky.edu](mailto:keller@uky.edu)

# Information is everywhere!

- What is your problem?
- Document your problem
- Enter a case
- Go to the Ex Libris Knowledge Center
- Use the product listserv
- Other resources to find help




# What is your problem?

- If your **product** is down
  - Check the network - Could it be a campus or internet problem?
  - If not, enter a system down ▼ case in Sales Force immediately and
  - THEN CALL the 24x7 hotline! **1-877-445-5693** and **press 9**
- If a whole **module** is down
  - Enter a case in Sales Force and with a system down ▼ case for the module.
  - If you don't hear from them within 15-30 minutes—CALL the 24x7 hotline.



# Ex Libris System Status

<http://status.exlibrisgroup.com/>

 **System Status**  
a ProQuest Company

[System Status](#) | [Privacy Policy](#) | [Security](#)

The System Status page presents the latest information on the availability of all multitenant instances. You may check this page at any time to see the current status information, or subscribe to be notified via email of interruptions to any individual service. If you are experiencing a real-time, operational issue that is not indicated below, please inform us by opening a customer support request.

System: All Region: All

[Remember my instances](#) [Reset](#)

	Instances	Email Alerts	Current Status	Jun-14	Jun-13	Jun-12	Jun-11	Jun-10	Scheduled Maintenance
<input type="checkbox"/>	Alma NA01								2017-Jun-11
<input type="checkbox"/>	Alma NA02								2017-Jun-11
<input type="checkbox"/>	Alma NA03								2017-Jun-11
<input type="checkbox"/>	Alma CA01								2017-Jun-11
<input type="checkbox"/>	Alma EU00								2017-Jun-10
<input type="checkbox"/>	Alma EU01								2017-Jun-10
<input type="checkbox"/>	Alma EU02								2017-Jun-10
<input type="checkbox"/>	Alma AP01								2017-Jun-17
<input type="checkbox"/>	Alma CN01								2017-Jun-17
<input type="checkbox"/>	PC CR01								
<input type="checkbox"/>	Summon CR01								
<input type="checkbox"/>	360 Link CR01								
<input type="checkbox"/>	Intota CR01								

Service is operating normally Information/Service Alert Information Performance issues Service disruption Scheduled maintenance

This page covers most of the Ex Libris products in the cloud.

PC CR01 is the Primo Central Knowledge Base.

Search the Ex L Knowledge Center for “**Monitoring Real-Time Status of Ex Libris Cloud Instances**” for more information.

# Define your problem

- Where does the problem occur?
  - Does it happen in a particular module?
  - Does it appear in any other product?
- Is it repeatable?
  - Does it happen no matter who is doing the task?
  - Does it happen for all data of a particular type?
  - Does it happen at a particular time or part of the day?
  - Does it happen for one library only? Or location or patron group or vendor?
- Who does it affect?
  - All staff or all public users
  - All users of one module or critical part of module?





# Document your problem

- Write down the steps in the workflow
- Take screen shots or snip-its and put them in a Word document
- Include specific examples—records, data types, users for examples
- If it only happened once and you can't find the example, look harder for the example!
- Any which way you can make the problem clear to your audience
  - Ex Libris
  - Listserv members
  - Closest product confidant ☺

# Documentation – Type it in

**Title** Failed attempts are making Clickable Logo in New UI

I am trying to make my logo clickable and link to a fresh search. I've added the text in #1 of the instructions in the New UI Customization to my custom1.css -

```
/* Call the clickable logo */
prm-logo div.product-logo {
display:none;
}
prm-logo div.product-logo-local {
display: flex;
}
prm-logo .logo-image, prm-logo img {
max-height: 100%;
}
```

Then I added #2 section to my custom.js

```
// Add Clickable Logo
app.controller('prmLogoAfterController', [function () {
var vm = this;
vm.getIconLink = getIconLink;
function getIconLink() {
return vm.parentCtrl.iconLink;
}
}]);
```

**Description**

```
app.component('prmLogoAfter',{
bindings: {parentCtrl: '<'},
controller: 'prmLogoAfterController',
template: '<div class="product-logo product-logo-local" layout="row" id="banner"
tabindex="0" role="banner">' +
'<a href="[target's_URL]"></a></div>'
});
})();
```

--- And now my logo doesn't show in the interface, let alone be clickable. :(

I am attaching my zip file, which uploaded successfully into my Sandbox test view:

[https://saa-kentucky-primosb.hosted.exlibrisgroup.com/primo-explore/search?vid=UKY\\_SANDNUI&sortby=rank&lang=en\\_US](https://saa-kentucky-primosb.hosted.exlibrisgroup.com/primo-explore/search?vid=UKY_SANDNUI&sortby=rank&lang=en_US)

I need help. I really don't want to have to keep the extra button for New Search in my header.

Thanks for your help.

Tari

Type the information into the description part of the form.

- Describe the problem.
- List the steps you took,
- Describe the results and the desired results.
- This was mostly cut and paste.



# Documentation - Attachment

UKY In House Fulfillment Problem

In Primo, when the availability is displayed to someone who is not logged in, it says "Loanable".

☆ **Food for the journey : a collection of recipes**  
Good Shepherd Catholic Church (Frankfort, Ky.); Good Shepherd School (Frankfort, Ky.) c2010  
● Available at Special Collections Research Center Spec Coll Research Center - Room 019 (TX715 .G665 2010 )

Book

Availability Details Virtual Browse

University of Kentucky Sign-in for more options Actions

Request Options:

Location Special Collections Research Center Spec Coll Research Center - Room 019 TX715 .G665 2010 Hide Details

Availability: (1 copy, 1 available, 0 requests)

Public notes: Section 6-Shelf 1Tray 4

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
5042501388788	Book	Loanable		Item in place

Guest e-Shelf My Account Sign in

InfoKat Discovery LIBRARY HOME | E-JOURNALS | DATABASES | ASK US | RESEARCH GUIDES | BROWZINE | HELP |

Search Library Catalog Course Reserves Local Collections

Food for the journey Search Advanced Search

All items that contain my query words anywhere in the record

Food for the journey : a collection of recipes  
Good Shepherd Catholic Church (Frankfort, Ky.); Good Shepherd School (Frankfort, Ky.) c2010  
● Available at Special Collections Research Center Spec Coll Research Center - Room 019 (TX715 .G665 2010 )

Availability Details Virtual Browse

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1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
5042501388788	Book	Loanable		Item in place

- This is page 1 of a 5 page Word document.
- Use Snipping tool or screen capture and text in a word processing document to show what is happening.
- You can use Tools or Export in Alma or Analytics to capture a list in Excel list of examples, or configuration rows.
- You can submit PDFs too.

# Ex Libris Customer Support System

- Click on the [Submit a Case](#) button on the Ex Libris Knowledge Center Page to get to the Ex Libris Support Portal.
  - You can get to the Support Portals from the Knowledge Center page too!
  - ProQuest products have their own portal.



More Sites ▼  
Ex Libris Corporate  
Ex Libris Support Portal  
Developer Network  
Ideas Exchange  
System Status  
PQ Support Center

- Check with your systems librarian before registering to submit cases yourself.
- Search for “**What is Ex Libris Escalation Policy?**” article to see that procedure when a case is not getting the attention it needs.
- You can also click on the [Submit a Case](#) button on the Ex Libris Knowledge Center Page to get to the Ex Libris Support Portal.

# Enter a Support Case

- Fill out all the boxes at the top
- Give the case a title that describes what is happening
- Explain the problem
  - List the steps in the workflow
  - Any other details that are consistent, like time of day, who is affected, browsers used
- Include email addresses of staff you want updated on case
- Attach documentation
  - Word document with screen shots of examples
  - Excel document generated from analysis or Tools/Export

# Support Case Form

**Case Edit**

Case Edit

SubmitAdd attachment & SubmitCancel

Case Details

Account NameUniversity of Kentucky Libraries

Asset

Affected Environment

Production Environment

Priority

Normal

Database Collection

Description Information

Title

Description

Additional Information

Category

—None—

Subject

—None—

Additional e-mails

E-mail 1

E-mail 2

E-mail 3

E-mail 4

E-mail 5

# Support Case tips

- If you find more examples or information, add them to the open case as you find them
- Check the Support Portal regularly to see if they have the case flagged for you to test or respond to a question.
- If you don't hear from Support a week after their initial response, poke them!
- You can refer to another user's related case by number when you open a new case or see it is related when reading your product listserv mail.
- If your case has a status of "Closing", it isn't too late to go in and edit the status to keep it open. Add a comment on why you want it to stay open.
- If a case is Closed and you need to reopen it, open a NEW case and refer to the old case number.
- If you solve the case yourself, enter a comment and close the case.

# Support Case Statuses

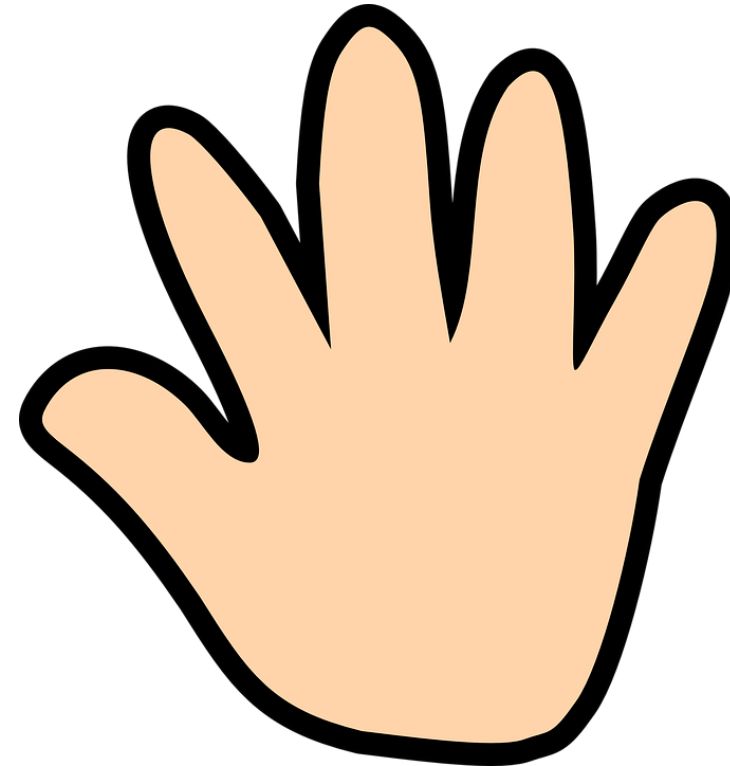
- New
- Tier 1 Analysis
- Pending Customer Response
- Pending Customer Testing
- Waiting for Process
- Tier 2 New
- Tier 2 Analysis
- Tier 2 W4I
- Tier 1 Answer to Tier 2
- Tier 2 Closed
- Pending Work Plan
- Development
- Pending Release
- Pending Customer Testing
- Shared with PQ
- Waiting for Vendor Input
- Product Manager Review
- Closing
- Closed

Search for this article: **"What is Case Status, and What Does It Mean"?**



# But before you submit that case...

- Visit the Ex Libris Knowledge Center
  - Re-read the latest Release Notes
  - Read the documentation
  - Search for knowledge articles
  - Check for training video on subject
- Use the product listserv
  - Search the listserv archives
  - Describe your problem in an email message





# Ex Libris Knowledge Center

- <https://knowledge.exlibrisgroup.com/>
- Start with the product group—Alma, Primo, SFX, Voyager ...
- Try a keyword search
- Check the Documentation for the process
- Look at information on recent releases



# Screen Shots of ExL KC ☺

The screenshot shows the ExLibris Knowledge Center homepage. At the top left is the ExLibris logo with the tagline 'Knowledge Center'. To the right is a navigation bar with links for 'Training', 'Documentation', 'Knowledge Articles', 'Developer Network', and a 'More Sites' dropdown menu. Below the navigation bar is a large grey banner with the text 'What can we help you with?'. In the center of the banner is a white search bar with the placeholder text 'Search' and a blue magnifying glass icon. Below the search bar are two buttons: 'System Status' and 'Submit a Case'. Below the banner is a section titled 'Browse by product:' which displays a grid of product names in various colors: Alma, Primo, Summon, Rosetta, campusM, Leganto, Aleph, Voyager, SFX, bX, 360 Services, Intota, Ulrich's, MetaLib, Verde, DigiTool, 360 KB, Primo Central, Alephino, UStat, and Cross Product. A small '+' icon is located below the 360 KB product name.

ExLibris  
Knowledge Center

Training | Documentation | Knowledge Articles | Developer Network | More Sites ▼

What can we help you with?


Search 🔍

System Status Submit a Case

Browse by product:

Alma Primo Summon Rosetta campusM Leganto Aleph  
Voyager SFX  
bX 360 Services Intota Ulrich's MetaLib Verde DigiTool  
360 KB +  
Primo Central Alephino UStat Cross Product

# Product Home Page




Training | Documentation | Knowledge Articles | Developer Network | More Sites ▼

Q How can we help you?


Home

## Alma




### Product Documentation

Access the latest documentation for Ex Libris products




### Training

Learn new skills and get certified with our tutorials, recorded training and other materials




### Release Notes

Stay informed about the features and capabilities included in each product release




### Implementation Guides

Understand methodology and requirements to facilitate successful implementations



### Product Materials

Learn more about our product offerings, and how they can serve your needs



### Knowledge Articles

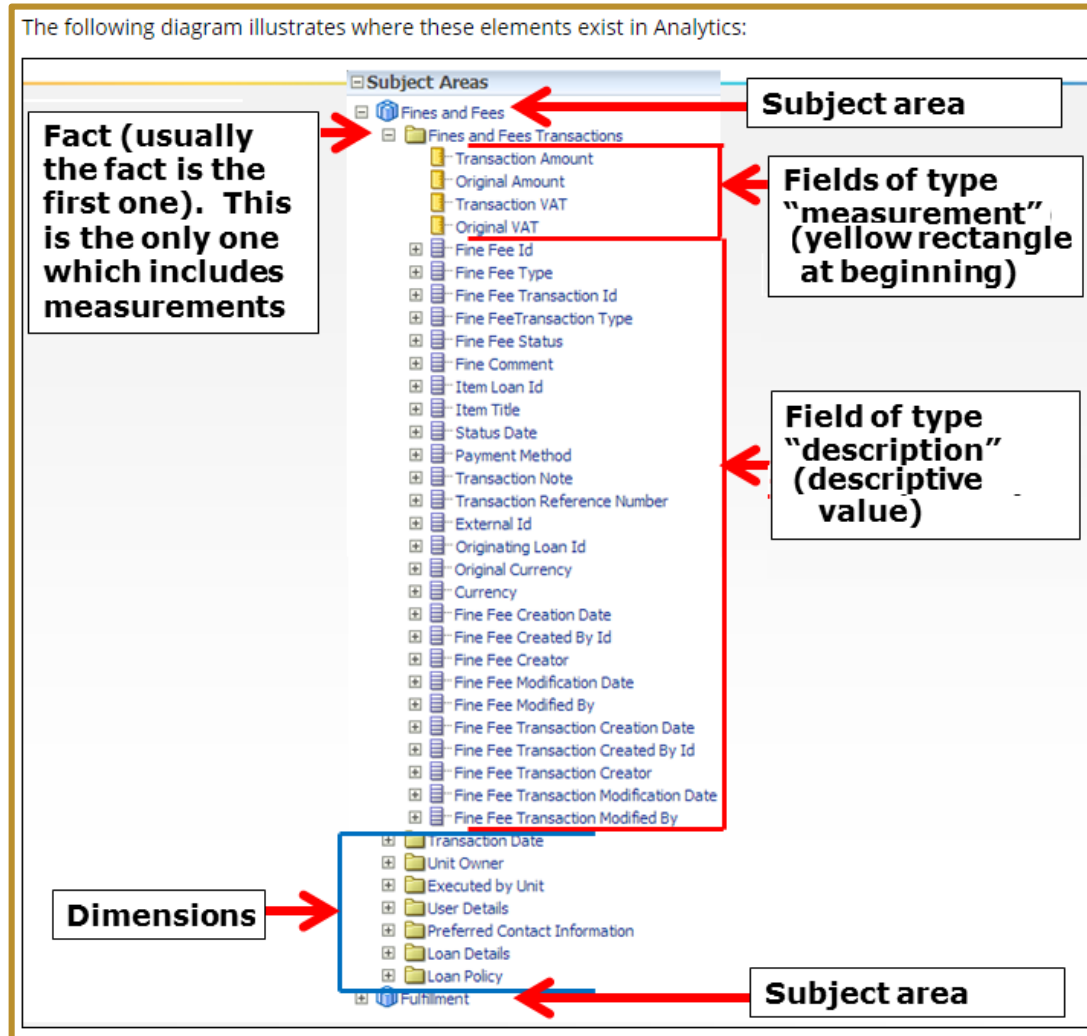
Search our extensive knowledge base for answers to commonly raised questions

#### Featured Articles

- How can I request new collections to be added to our Discovery Indexes, KnowledgeBases and the Alma Community Zone?
- Alma Digital
- Alma March 2017 Release Notes
- Cleanup or ongoing maintenance of an Electronic Collection using Excel file
- Springer Link is moving to HTTPS protocol

# Documentation

It also comes in French and German!



Home » Alma

## Product Documentation

### Alma Online Help (English)

[Getting Started](#)

[Acquisitions](#)

[Fulfillment](#)

[Resource Management](#)

[Administration](#)

[Alma-Primo Integration](#)

[Alma-Summon Integration](#)

[Analytics](#)

[Integrations with External Systems](#)

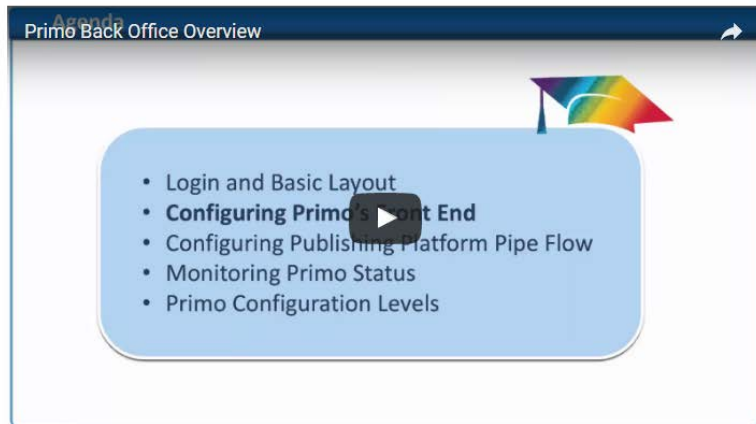
[Managing Multiple Institutions Using a Network Zone](#)

[Mobile](#)

[Alma Glossary](#)

# Training

## 01 Primo Back Office Overview



Duration: 17 min.

Description	The Primo Back Office is where all configurations to the Primo Front End and the rest of the system are made.
Target Audience	Staff responsible for maintaining Primo Staff responsible for ensuring data is correctly represented in Primo
Prerequisites	Basic familiarity with the Primo Front End

## Primo Administration

This Training Program describes in depth how to configure Primo from the Back Office. Main topics covered are publishing, normalization rules, and Front End configurations.

- 01 Primo Back Office Overview
- 02 Primo Administrative Structure
- 03 Primo Publishing Platform
- 04 Publishing Platform: Pipes Configuration
- 05 PNX
- 06 Normalization Rules Overview
- 07 Normalization Rules Configuration
- 08 Normalization and Delivery Template Mapping Tables
- 09 Local Search Scopes
- 10 Primo Views
- 11 Updating Display Labels



# Release Notes



**Release:** May 2017

**Highlights:**

**Export to BibTex -**

As requested and voted via the Ideas Exchange, we are now adding the option to export to BibTex format. This option is being added to the other actions that are already available for the records from the results set and for the full record.

**User Tags -**

User tags are supported for all customers both in the classic interface and in the new interface. Because user tags are indexed and searchable, users can share reading lists and expand other user's lists.

**Preferred Record Configuration -**

Previously, the hierarchy for the selection of the preferred record in cases of the deduplication was hardcoded. In the new release, you can now control the precedence via the new "Preferred Record- Delivery Category Priority" mapping table at the institution level. Changes to this table require you to run the pipe process.

**Syndetics Book Covers -**

As part of the ProQuest-ExLibris integration and cooperation, we are now offering Syndetics books covers to all our Primo customers. There is no need to activate them. They will be available after the upgrade.

**New Primo User Interface -**

We are now in the final stages of delivering the missing features from the classic interface in the new UI. In this release you will find Browse functionality, Alma E-Journal search, Session Search history, and Fetch Items (Citation Linker).

The default of the new interface presents the facets on the right side of the results. In customer usability tests, users found this logical and intuitive. However, we know that some libraries prefer to present facets on the left side of the results, so we have added an easy option to configure this without the need for customization. If you have already implemented such a customization, we recommend that you remove it in order to use the new configuration.

This was a very busy release and these are just the main highlights. You can find much more in the Highlights documentation including the new Exploration group in Primo analytics, support for the new interface for the Times cited service, and more...

**Documentation and Webinars:**

More information about the May release can be found in the Ex Libris Knowledge Center:

- Knowledge Center > Primo > Release Notes
- Knowledge Center > Primo > Product Documentation > Highlights

Updated versions of both documents will be published on April 28, 2017.

Ex Libris Confidential  
1

Each product has its own way of documenting what is new and some will announce webinars for demonstrating enhancements.

# Implementation Guides

Not all products have this section, but when you are migrating, the information is very helpful.

## Implementation and Migration

### Implementation Guides

- Alma and Primo Cutover Process
- Getting Ready for Alma and Discovery Implementation
- Technical Requirements for Alma and Discovery Implementation
- Other Implementation Guides and Alma Configuration Form

### Migration Guides

- Alma Migration Considerations for Consortia
- Alma Migration – Combining or Separating Source Databases
- Electronic System Migrations
- ILS Migrations
- Testing Migrated Data



# Knowledge Articles



Home » Voyager

## Knowledge Articles

There are so many articles for us to display. Below are some suggested articles, but please feel free to search for more specific results using the above search box.

### Featured Articles:

- [Introduction to the Knowledge Center](#)
- [Knowledge Center Questions and Answers](#)
- [Ex Libris Voyager Patron Directory Services \(PDS\) Security vulnerability patch](#)
- [9.2.1 Implementation Guide](#)
- [Fiscal Period Close resources and FAQs in Voyager](#)
- [Resources and FAQs for Patron Utilities in Voyager](#)
- [Could not retrieve field order configurations" when open Cataloging after upgrade to 9.2.0](#)
- [Resources and FAQs for ODBC drivers for Prepackaged Reports](#)

Search by  
keywords  
to find  
articles

[Featured Articles](#) - [Most Popular](#) - [Highest Rated](#) - [Recently updated](#) - [Recently added](#)

# Product Listservs

- <http://el-una.org/mailling-lists/>
  - where other users can help you with these problems
- Membership in ELUNA not required to use product listservs
- Queries, Analyses and Reports
- Alternative workflows
- Configuration puzzlements
- What's going on?
  - Trouble with a server, but you aren't sure
  - Strange happenings after a new release



# Ex Libris YouTube Channel

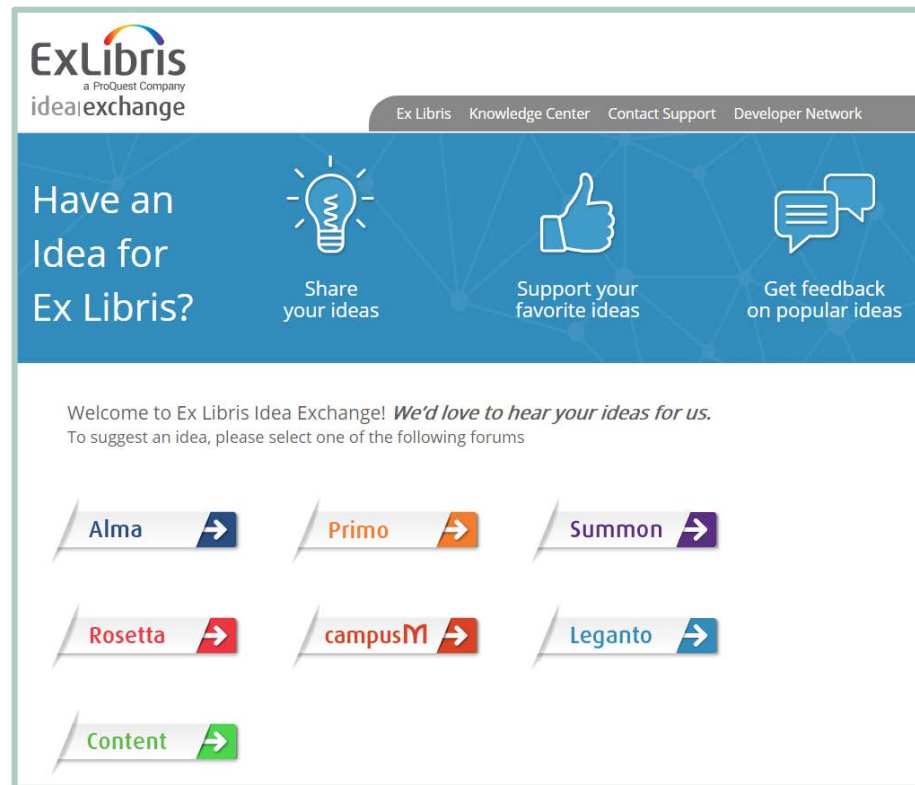
▪ <https://www.youtube.com/user/ExLibrisLtd>

- Here you will find lots of goodies
  - Recorded webinars
  - Short videos on products



# Ex Libris Idea Exchange

- <http://ideas.exlibrisgroup.com/>



119  
votes


Vote

### Primo Central FRBR process specific to each customer's activations


Currently, Primo Central performs the FRBR process on its entire index without considering the collections activated at the customer's level. Having FRBR at the level of the whole PC leads to often have in the catalogue a 'View all versions', even if in the PC of the Institution there is just 1 version of a record. Another consequence is also that Primo Central facets display unrelated results. In some cases, other records (from the FRBR group) may not appear, which does apply to the facet limitation, because they haven't been activated in the PC registration system. This situation often leads to frustrations: library staff and end-users are puzzled when incoherency happens in search result display.


We would like Primo Central to perform the FRBR process specific to each customer's activations.

See also:  
(1) NERS requests 4426 and 4327  
(2) Primo Central Facets Display Unrelated Results  
[https://knowledge.exlibrisgroup.com/Primo\\_Central/Knowledge\\_Articles/Primo\\_Central\\_Facets\\_Display\\_Unrelated\\_Results](https://knowledge.exlibrisgroup.com/Primo_Central/Knowledge_Articles/Primo_Central_Facets_Display_Unrelated_Results)



 **François Renaville** shared this idea · May 30, 2017

4 comments

 Tweet

 Like 0

Add a comment...

Your email address or sign in with  

Post comment



# ELUNA/IGeLU - Enhancements

- Join ELUNA to have a vote in the enhancement process for your products
- Review enhancements and vote on NERS
  - Enhancement voting is by product
  - Each institutional member has 1 ballot. A consortium member will have 1 vote for the consortium. (Usually 100 “votes” to assign to the enhancements that will benefit your institution or consortium the most.)
  - Users submit enhancement requests on NERS system

**NERS** Home Request Vote Report

Home

Welcome Tari Keller

Active Elections

Product	Ballot	Closing Date	Stage
SFX	SFX CKB	January 08, 2017	General Voting Round
Summon	2017 Summon Enhancement Voting	June 10, 2017	General Voting Round
Primo	Primo software ballot 2017 (first round)	June 20, 2017	General Voting Round


Copyright 2016, International Group of Ex Libris Users & Ex Libris Users of North America  
About IGeLU | About ELUNA | About NERS

# Other ELUNA Benefits

- Discount registration for annual meeting
  - Technical Seminar 2 days before ELUNA
  - Developers Day 1 day before ELUNA
  - 3 day conference (Anyone can participate in conference, but ELUNA membership is required for other events.)
- Access to all presentations after the meeting
- Access to the ELUNA Document Repository
- Participate in Working Groups for your product(s)
- Participate in Regional Users Group like eBUG
- Participate in Special Interest Groups
- Run for seat on the Steering Committee



# Ex Libris Support Portal Email Preferences



a ProQuest Company

Logout

Cases

Search Cases

Publish

Account Assets

Email Preferences

Other Support Options:

ProQuest. Support

Messages and Alerts

[Link to Salesforce documentation](#)

[Escalation policy](#)

[Contact us](#)

Welcome, Tari Keller

[My Profile](#) | [Logout](#)

Search

Cases

Go!

[Advanced Search...](#)

Email Preferences

Dear Tari,  
In this page you can manage your email preferences and subscribe to relevant mailing lists. Personal details, such as email address, can be edited under [My Profile](#).

Available Mailing Lists

☐ Select All

Product Specific Support Messages

☒ Alma (includes subscription to corresponding System Status Page notifications)

☒ Alma Data Services

☒ Primo

☒ Primo Central (includes subscription to corresponding System Status Page notifications)

☐ SFX

☒ SFX KB

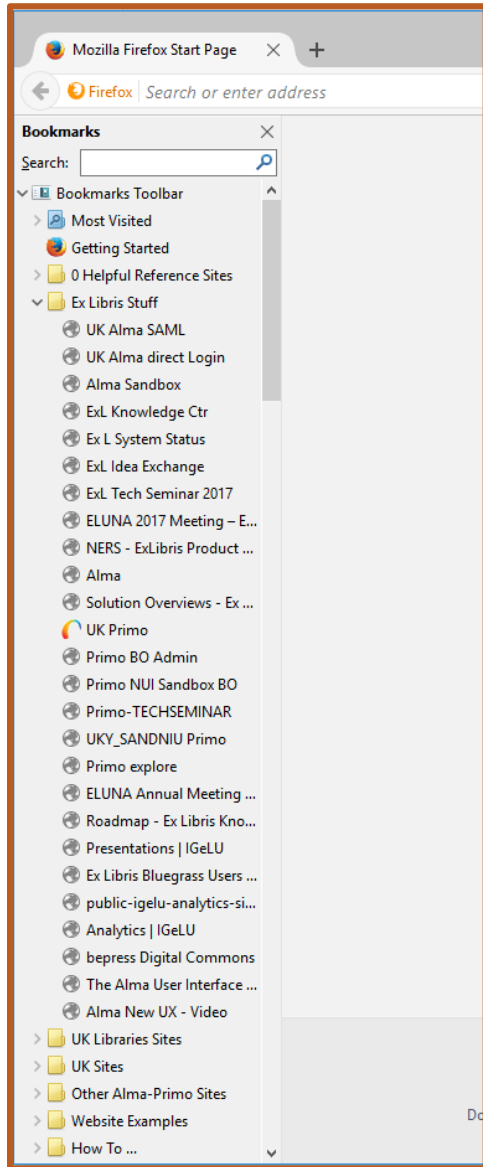
Ex Libris News and Information

☒ Articles

☒ Messages for Ex Libris customers (e.g. availability of local offices during holidays, etc.)

Save

# Browser Bookmarks – organize them!



Not sure why this took me so long to figure out. My bookmarks list used to go on forever! Putting them in folders and re-ordering them saves time.

Firefox to the left, and Chrome above have great bookmark organization options. Internet Explorer and Edge are similar to Firefox, with the list on the side.

This is my last bit of wisdom to share today.



# Questions?

